

ASSESSORS' HANDBOOK
SECTION 222

STANDARD FORM LIST

JANUARY 1998

(USE FOR LIEN DATE JANUARY 1, 1998)

CALIFORNIA STATE BOARD OF EQUALIZATION

JOHAN KLEHS, HAYWARD

DEAN F. ANDAL, STOCKTON

ERNEST J. DRONENBURG, JR., SAN DIEGO

KATHLEEN CONNELL, SACRAMENTO

JOHN CHIANG, ACTING MEMBER, LOS ANGELES

FIRST DISTRICT

SECOND DISTRICT

THIRD DISTRICT

STATE CONTROLLER

FOURTH DISTRICT

E. L. SORENSEN, JR., EXECUTIVE DIRECTOR



PREFACE

Forms included on this list are intended for use throughout the state. An asterisk (*) preceding a form number indicates that the form is standard throughout the state as **prescribed** by the State Board of Equalization. All forms are recommended by the Policy, Planning, and Standards Division

Most of the forms are designed to implement instructions contained in the *Assessors' Handbook* and are numbered to correspond with the Handbook section. In some cases, a Handbook section is not currently available. If you need a few copies of any particular form or a table of contents (purchase order of Handbook Sections, you may obtain them directly from the Policy, Planning, and Standards Division.¹

This edition includes a column titled "Number of Sheets (2 pages per sheet)." Also, we indicate whether there is printing on both sides of the sheet and whether the sheet contains the instructions. Where the size of the paper is not 8 1/2 by 11 inches, we have provided the size; i.e., AH 570-1-L (8 1/2" x 14"). Our purpose in providing these data is that they may assist you in ordering forms.

We welcome your suggestions. We are interested in your thoughts on the way information appears in this Handbook Section and whether it improves your assessment system.

¹ A private party should obtain forms from the assessor of the county in which the property is located.

**POLICY, PLANNING, AND STANDARDS DIVISION
PROPERTY TAXES DEPARTMENT
REPRODUCIBLE FORMS LIST**

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*BOE-58-AH	Claim for Reassessment Exclusion for Transfer Between Parent and Child (front and back)	7-97	PT-58	3-8-95	1
*BOE-58-G	Claim for Reassessment Exclusion for Transfer from Grandparent to Grandchild (front and back)	7-97	--	--	1
*BOE-60-AH	Claim for Replacement Dwelling Base-Year Value Transfer (Claimants at Least Age 55) (instructions on back)	7-97	PT-60	3-8-95	1
*BOE-62	Claim for Replacement Dwelling Base-Year Value Transfer (Severely Disabled Persons) (instructions on back)	7-97	PT-62	6-23-93	1
*PT-63	Claim for New Construction Reappraisal Exclusion for Severely Disabled Persons (instructions on back)	6-23-93	PT-63	5-2-91	1
*PT-63A	Claim for Disabled Accessibility Construction Exclusion from Assessment (front and back)	8-4-94	--	--	1
*PT-64	Claim for Seismic Safety Construction Exclusion from Assessment (front and back)	3-16-94	PT-64	5-2-91	1
*PT-65	Claim for Intercounty Transfer of Base-Year Value from Principal Residence Damaged or Destroyed in a Governor-Declared Disaster to Replacement Property (instructions on back)	3-8-95	--	--	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
AH 121	Statement of Financial Interest (front only)	8-13-67	--	--	1
AH 210-B	Map Book Index to Sub-divisions. Alpha or Numeric (front only) (17"x11")	2-60	AH 210-B	8-54	1
*BOE-231-AH	Welfare Exemption/Section 231 Change In Eligibility Or Termination Notice (front and back)	11-97	AH 231	3-13-96	
*AH 236	Exemption Of Leased Property Used Exclusively For Low Income Housing (front only)	6-18-92	--	--	1
*AH 236A	Supplemental Affidavit For AH 236 - Housing - Lower Income Households (front and back, 3 pages of instructions)	6-18-92	--	--	3
AH 258	Certificate of Security for Taxes on Personal Property (instructions on back)	10-76	AH 258	3-19-64	1
*BOE-260	Certificate and Affidavit for Exemption of Work of Art (instructions on back)	11-97	AH 260	1-1-96	1
*BOE-260-A	Certificate and Affidavit for Exemption of Certain Aircraft (instructions on back)	11-97	AH 260A	1-1-96	1
*BOE-260-B	Claim for Exemption from Property Taxes of Aircraft of Historical Significance (front and back)	11-97	AH 260B	3-13-96	1
*BOE-261	Claim for Veterans' Exemption (front and back and two pages of instructions) (8 1/2" x 14")	11-97	AH 261	1-1-96	2
AH 261B	Veterans' Service & Claim Record (front only)	10-1-81	AH 261B	12-20-74	1
AH 261C	Unrecorded Contract of Sale Declaration (front and back)	10-1-81	AH 261C	2-14-74	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
AH 261-D	Soldier's & Sailor's Civil Relief Act Declaration (front only)	10-1-81	AH 261-D	1-10-66	1
*BOE-261-G	Disabled Veterans' Property Tax Exemption (form-- front only; instructions-- front and back)	11-97	AH 261G	1-1-96	2
*BOE-261-G NOTICE	Disabled Veterans' Exemption Change of Eligibility Report (front only)	11-97	AH 261G	1-1-96	1
AH 261H	Disabled Veterans' Service and Claim Record (front only)	10-1-81	AH 261H	10-1-80	1
*BOE-262-AH	Church Exemption (front and back)	11-97	AH 262	9-30-96	1
*BOE-263	Lessors' Exemption Claim (front and back)	11-97	AH 263	9-30-96	1
*AH 263A	Qualified Lessors' Exemption Claim (front and back)	6-18-92	AH 263A	10-1-90	1
*BOE-264	College Exemption (front and back)	11-97	AH 264	10-1-88	1

The AH 265 Cemetery Exemption claim form consists of four pages of form and three pages of instructions

*BOE-265-AH	Cemetery Exemption (first page)	11-97	AH 265	3-13-96	
*BOE-265-A	Section A of Claim for Cemetery Exemption--Information on Property	11-97	AH 265A	3-13-96	4
*BOE-265-B FRONT	Section B of Claim for Cemetery Exemption Completed by Profit-Making Organizations (third page)	11-97	AH 265B	3-13-96	
*BOE-265-B BACK	Section B of Claim for Cemetery Exemption Alternate Question 8	11-97	AH 265B	3-13-96	
*BOE-265-AH Instructions	Cemetery Exemption Instructions (first sheet-front and back; second sheet-front only)	11-97	AH 265 Instructions	3-13-96	
*BOE-266-AH	Claim for Homeowners' Property Tax Exemption (front--instructions on back)	11-97	AH 266	1-1-96	1
*BOE-266-AH CARD	Same on data input card (front--instructions on back)	11-97	AH 266 CARD	1-1-96	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*BOE-266-S	Spanish version, Claim for Homeowners' Property Tax Exemption (front-- instructions on back)	11-97	AH 266	1-1-96	1
*BOE-266-S CARD	Spanish version of the claim, card (front-- instructions on back)	11-97	AH 266 CARD	1-1-96	1
*BOE-266-D	Homeowners' Property Tax Exemption Cooperative Housing Information Request (front and back)	11-97	AH 266D	10-1-90	1

The AH 267 Welfare Exemption claim form consists of four pages of form, two pages of instructions, and one page of Assessor's Field Inspection Report.

*BOE-267	Welfare Exemption (First filing) (first page)	11-97	AH 267	3-13-96	
	Section A of Claim for Welfare Exemption--Information on Organization (second page)	11-97	AH 267A	3-13-96	
*BOE-267-B	Section B of Claim for Welfare Exemption--Information on Property (third page)	11-97	AH 267B	3-13-96	4
*BOE-267-B	Equipment and other property at this location that is being leased, rented, or consigned to the claimant (fourth page)	11-97	AH 267B	3-13-96	
*BOE-267-F	Welfare Exemption, Assessor's Field Inspection Report (front only)	11-97	AH 267F	3-13-96	
*BOE-267 Instructions	Welfare Exemption Instructions (front and back)	11-97	AH 267 Instructions	3-13-96	
*BOE-267-A	Welfare Exemption (Annual Filing) (front and back)	11-97	AH 267A	1-1-96	1
*BOE-267-G	Welfare or Veterans' Organization Exemption Finding Sheet (for Board's use only) (six pages front and back self-carboned)	11-97	AH 267G	9-96	3
*AH 267G-1	Preliminary Welfare Exemption Notice (for Board use only) (front only)	1-96	AH 267G-1 (Notice)	3-95	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*AH 267G-2	Welfare Exemption Notice (For Board Use Only) (front only)	1-96	AH 267G-2 (Notice)	3-95	1
*AH 267H	Welfare Exemption Supplemental Affidavit- Housing-Elderly Or Handicapped Families (front and back, 2 pages of instructions)	5-26-94	AH 267H Income	1993	2
*AH 267L	Welfare Exemption Supplemental Affidavit- Housing-Lower-Income Households (front and back, 2 pages of instructions)	5-26-94	AH 267L Income	1993	2
*AH 267R	Welfare Exemption Supplemental Affidavit Rehabilitation-Living Quarters (Yearly Filing) (first page--front only; second page--front and back)	1-1-96	AH 267R	9-1-94	2
*BOE-267-S	Religious Exemption (front and back)	11-97	AH 267S	9-30-96	1
*BOE-267-S NOTICE	Religious Exemption Change In Eligibility Or Termination Notice (front-instructions on back)	11-97	AH 267S NOTICE	3-13-96	1
*BOE-268-A	Exemption for Property Used by a Public School (front and back)	11-97	AH 268A	3-8-95	1
*BOE-268-B	Exemption for Property Used by a Free Library or Free Museum (front and back)	11-97	AH 268B	9-1-92	1

The AH 269 Veterans' Organization claim form consists of four pages of form, two pages of instruction, and one page of Assessor's Field Inspection Report.

*BOE-269-AH	Veterans' Organization Exemption (first page)	11-97	AH 269	3-13-96	
	Section A of Claim for Veterans' Organization Exemption Information on Organization (second page)	11-97	AH 269A	3-13-96	4
*BOE-269-B	Section B of Claim for Veterans' Organization Exemption (third page)	11-97	AH 269B	3-13-96	

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*BOE-269-B	Equipment and Other Property at this location that is being leased, rented or consigned to the claimant (fourth page)	11-97	AH 269B	3-13-96	
*BOE-269-F	Veterans' Organization Exemption Assessor's Field Inspection Report (front only)	11-97	AH 269F	3-13-96	
*BOE-269-AH Instructions	Veterans' Organization Exemption Instructions (front and back)	11-97	AH 269 Instructions	3-13-96	
*BOE-270-AH	Exhibition Exemption (front only)	11-97	AH 270	10-1-81	1
*BOE-305-AH	Application For Changed Assessment (front only-instructions on back)	7-97	AH 305	1-11-96	1
*BOE-502-AH	Change of Ownership Statement (front and back)	7-97	AH 502	3-13-96	1
*BOE-502-A	Preliminary Change of Ownership Report (front and back)	7-97	AH 502A	3-13-96	1
*BOE-502-G	Change of Ownership Statement, Oil & Gas Property (front and back)	7-97	--	--	1
*BOE-502-P	Possessory Interests Annual Usage Report (front and back)	8-97	--	--	1
AH 510-A	Residential Property Appraisal Record (front and back)	8-69	AH 510-A	9-68	1
AH 510C	Industrial Property Appraisal Record	3-54	AH 510C	6-48	1
AH 510E	Commercial Property Appraisal Record (front and back)	3-74	AH 510-B	3-54	1
AH 510E-1	Income Record (Shopping Center) (front only)	6-9-72	--	--	1
AH 510E-2	Expense Data (Shopping Center) (front only)	6-9-72	--	--	1
AH 510E-3	Shopping Center Appraisal Form (front only)	6-9-72	--	--	1
AH 511C	Urban Property Rental Record (front and back)	12-75	AH 511C	10-44	1
BOE-886-PT	Possessory Interest Appraisal Record (front and back)	7-97	AH 517	2-74	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
AH 521	Rural Property Appraisal Record (front and back)	12-76	AH 521	11-74	1
AH 521-A	Restricted Tree and Vine Valuation Record (front only)	1-75	--	--	1
AH 521-B	Tree & Vine Record (grid on back)	12-76	AH 520-B	7-1-60	1
AH 521-C	Rural Property Sales- Rent Record- -Farming Properties (grid on back)	12-76	AH 520M-1	11-59	1
AH 521-D	Grazing Sales and Rent Record (grid on back)	12-76	AH 520M-1	11-59	1
AH 521-H	Farm Building Record (grid on back)	12-76	AH 521-H	3-75	1
BOE-887-PT	Residential Building Record (front and back)	7/97	AH 530A	1971	1
AH 530B	Commercial Building	3-54	AH 530B	10-45	1
AH 530C	Industrial Building Record (front and back)	3-54	AH 530C	10-45	1
AH 530D	Service Station Record (front and back)	3-54	AH 530D	10-46	1
AH 530E	Miscellaneous Building Record (grid on back)	3-54	--	--	1
BOE 530-FPT	Manufactured Home Building Record (front and back)	7-97	AH530F	--6-6-80	1
AH 530G	Structure Detail Record (front only)	3-54	--	--	1
AH 530GG	Structure Replacement Cost Record (front only)	3-54	--	--	1
AH 530I	Structure Cost Record (grid on back)	9-75	--	--	1
AH 530S	Improvement Summary Record (front only)	3-54	AH 530-E	12-48	1
AH 530X	Grid Record, Single (8 1/2" x 11") (front only)	4-54	--	--	1
AH 530XX	Grid Record, Double (17" x 11") (front only)	3-54	--	--	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
AH 540L	Water Utility Data, Summary Computation Record--Capitalized Income & Historical Cost (front only)	7-1-65	AH 540L	9-59	1
*AH 540-S	Mutual or Private Water Company Property Statement (front and back)	1-1-96	AH 540-S	8-3-81	1
AH 551	Forest Property Appraisal Record (front and back)	11-1-77	--	--	1
*AH 560-A	Aggregate Production Report (front and back, 2 pages of instructions)	1-1-96	AH 560-M	7-28-81	2
*AH 560-B	Mining Production Report (front and back, 2 pages of instructions)	1-1-96	AH 560-B	9-26-91	2
*AH 560-C	Mining Claim Production Report (front and back, 1 page of instructions)	1-1-96	AH 560-M	7-28-81	2
*BOE-566-D	Oil & Dissolved Gas Production Report (front and back, two pages of instructions)	3-97	AH 566-D	3-13-96	2
*AH 566-F	Dry Gas Production, Equipment, New Well, Redrill and Rework Report(front and back, two pages of instructions)	1-1-96	AH 566-F	8-1-83	2
*BOE-566-J	Oil, Gas and Geothermal Personal Property Statement (instructions on back)	3-97	AH 566-J	3-13-96	1
*AH 566-K	Annual Oil and Gas Operating Expense Data (front and back, two pages of instructions)	3-13-96	AH 566-K	8-1-83	2
*AH 567-D	Geothermal Production Report (front and back, 2 pages of instructions)	1-1-96	AH 567-D	8-19-81	2
*AH 567-K	Annual Geothermal Operating Expense Data (front and back, 2 pages of instructions)	1-1-96	AH 567-K	8-19-81	2
*AH 570-1-L	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report--Flight Detail, Piston-Powered & Turboprop Types (14" x 8 1/2") (instructions on back)	1-1-96	AH 570-1-L	1-23-83	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*AH 570-1-S	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report--flight Detail, Jet Engine Types Only (14" x 8 1/2") (instructions on back)	1-1-96	AH 570-1-S	3-16-94	1
*AH 570-2	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report--Flight Equipment Value Computation (14" x 8 1/2") (instructions on back)	1-23-83	AH 570-2	2-16-82	1
*AH 570-3	Supplementary Schedule to the Business Property Statement, Air Carrier's Operation Report--Aircraft Value Computations (14" x 8 1/2") (instructions on back)	1-1-96	AH 570-3	8-3-94	1
*BOE-571-A	Agricultural Property Statement, short form (four pages of form, four pages of instructions)	11-97	BOE-571-A	7-97	4
AH 571-B	Equipment Replacement Cost Record (front only)	4-7-71	AH 571 B	9-60	1
*BOE-571-D	Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported Schedule B of the Business Property Statement. (front and back)	3-97	AH 571-D	1-1-96	1
*BOE-571-F	Agricultural Property Statement (four pages of form, four pages of instructions)	11-97	BOE-571-F	3-97	4
*AH 571-F-2	Supplementary Schedule to the Agricultural Property Statement, Registered and Show Horses Other Than Racehorses (instructions on back)	1-1-96	AH 571-F-2	10-18-85	1
*AH 571-J	Annual Racehorse Tax Return (front only, two pages of instructions)	10-18-85	AH 571-J	7-1-83	2
*AH 571-J-1	Annual Report of Boarded Racehorses (instructions on back)	10-18-85	AH 571-J-1	7-1-83	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*AH 571-K	Horse Property Statement (Other Than Racehorses) (front and back, two pages of instructions)	1-1-96	AH 571-K	10-18-85	2
*BOE-571-L	Business Property Statement, long form (three pages of form printed vertically, four pages of instructions)	11-97	BOE-571-L	3-97	4
*BOE-571-L	Business Property Statement, long form (three pages of form printed horizontally, four pages of instructions)	11-97	BOE-571-L	3-97	4
*BOE-571-L Alternate	Alternate Schedule A for Bank, Insurance Company, or Financial Corporation Fixtures (front only, instructions on back)	3-97	AH 571-L Alternate Schedule A	6-27-95	1
*BOE-571-M	Miscellaneous Property Statement (front only, includes instructions)	3-97	AH 571-M	1-1-96	1
*AH 571-P	Pipeline Property Statement (front and back, two pages of instructions)	3-13-96	AH571-P	8-31-95	2
*BOE-571-R	Apartment House Property Statement (instructions on back)	3-97	AH 571-R	3-13-96	1
*AH 571-RW	Right-Of-Way Property Statement (front and back, two pages of instructions)	3-13-96	AH571-RW	8-31-95	2
*BOE-571-S	Business Property Statement, short form (front and back, four pages of instructions)	11-97	BOE-571-S	3-97	3
*AH 572-A	Insurance Company Statement of Transfer (instructions on back)	10-11-96	--	--	1
AH 576A	Vessel or Aircraft Form (front and back of card is on the front only)	8-3-81	AH 576A	2-76	1
AH 576B	Vessel Form (front and back)	8-3-81	AH 576B	2-76	1
AH 576-B1	Vessel Owner's Report (front and back)	8-3-81	AH 576-B1	2-76	1
AH 576C	List of Vessels (front only)	2-76	AH 576C	6-7-73	1

<u>Form Number</u>	<u>Title</u>	<u>Date</u>	<u>Supersedes</u>		# of Sheets (2 pgs /sheet)
			<u>Form Number</u>	<u>Dated</u>	
*BOE-576-D	Vessel Property Statement (instructions on back)	11-97	BOE-576-D	3-97	1
*BOE-576-E	Affidavit for 4-Percent Assessment of Certain Vessels (front only) (instructions on front)	11-97	AH 576E	1-20-95	1
AH 577-A	Aircraft Form (front and back)	8-3-81	AH 577-A	2-76	1
AH 577-B	List of Aircraft (front only)	8-3-81	AH 577-B	4-11-72	1
C-740-A	Application for Temporary Appraiser's Certification (front and back)	2-76	C-740A	7-73	1
C-742-A	Training Courses for Property Tax Appraisers (front and back)	9-81	C-742A	1-5-72	1
C-742-B	Certificate of Training Successful completion (front only)	2-92	PT-747-D	5-88	1
C-743-A	Reporting of Property Appraiser's Change in Employment Status to the State Board of Equalization (front and back)	9-81	C-743A	4-73	1
C-744-A	Report of Completed Training Courses to the State Board of Equalization (front and back)	9-84	C-744A	9-81	1
C-745-A	Request for Course Approval (front only)	1-1-72	--	--	1
C-746-A	Registration form (front only)	9-81	C-746A	2-81	1
C-747	Certificate of Appraiser Certification (front only) (Board use only)	6-92	C-747	5-88	1
C-747-A	Certificate of Advanced Appraiser Certification (front only) (Board use only)	8-90	--	5-88	1
C-747-B	Application for Advanced Appraiser Certification (front only)	3-79	C-747B	2-76	1
C-747-C	Certificate of Training-Attendance (front only)	8-90	C-742-C	4-90	1